

Reference Guide:

CPR+ Program Function Keys

Table of Contents

The Table of Contents for this Reference Guide is located on page 21.

Introduction

This Quick Guide lists a variety of function keys (also known as shortcut keys) used throughout the **CPR+** application. Most of these function keys are identify toward the bottom of the associated **CPR+** screen (see the figure below).

Keep in mind that this document does not contain the specific details for each of these keys or screens as this information is identified in the F1 (online) help screens, user manual or other **CPR+** documentation.

Account Status Screen for Tristen TPN

Phone: 614-666-6666
SSN / MRN: 980-19-2090 / 200516

Insurance #1: Medicaid (Rx)
Insurance #2: Medicare (H)

Date	Inv. #	DOS	Payor	Billed	Expected	Payment	Adjustment	DES	Balance
05/23/2005	467	04/26/2005	Medicare (H)	300.00	125.00	0.00	0.00	INV	125.00
06/24/2005	-----	04/26/2005	Medicare (H)	0.00	0.00	20.00	0.00	CHK	105.00
06/24/2005	-----	04/26/2005	Medicare (H)	0.00	0.00	0.00	105.00	ADJ	0.00
06/24/2005	-----	04/26/2005	Aetna	280.00	105.00	0.00	0.00	2ND	105.00
07/15/2005	-----	04/26/2005	Aetna	0.00	0.00	50.00	0.00	CHK	55.00
06/13/2005	526	04/26/2005	Medicare (H)	1316.33	724.00	0.00	0.00	INV	724.00
06/27/2005	571	05/26/2005	Medicare (H)	300.00	125.00	0.00	0.00	INV	125.00
06/27/2005	614	06/26/2005	Medicare (H)	300.00	93.75	0.00	0.00	INV	93.75
06/27/2005	615	06/19/2005	Medicare (H)	3005.35	2250.35	0.00	0.00	INV	2250.35
09/12/2005	662	07/26/2005	Medicare (H)	300.00	93.75	0.00	0.00	INV	93.75

Account Status Screen Function Keys

Patient Balance: 0.00 Ending Balance: 0.00

Create New Invoice (F9) Post Payment (F8) Take Adjustment (Alt+F8) Bill 2nd (F6) Edit Invoice (Shift+F4)
Post Denial (Ctrl+F8) Credit / Rebill (Ctrl+F9) Delivery Tickets (F5) New Billing Note (Ctrl+F3) Close (F2 / Esc)

835 ERN Report Screen

- **F6** – This Function Key toggles between showing completed batches (shown in yellow) or not. Completed batches can only be reviewed by the user.
- **F9** - Tag the ERN as complete.

A/R Manager

- **F3** - Enter a New / View Existing Collection Notes
- **F4** - Re-print the selected invoice
- **F5** - See Delivery Tickets that correspond with the selected invoice
- **F6** - See All Transactions (payments, adjustments) that correspond with the selected invoice
- **F7** - Print Invoice List
- **F8** - Post Payment
- **F10** - See Payor Information
- **Alt+F8** - Take Adjustment

Account Status Screen

- **F3** - View / Create Billing Notes - This Patient
- **F4** - Resubmit / Re-print This Invoice (Same Payor)
- **F5** - See All Confirmed Delivery Tickets
- **F6** - Bill Secondary or Patient
- **F7** - Print Account Summary Info
- **F8** - Post a Payment
- **F9** - Create a New Invoice
- **Shift+F3** - View / Edit Insurance Notes
- **Shift+F4** - Edit Invoice
- **Shift+F5** - View Charges for this Invoice
- **Shift+F7** - Reprint Invoice
- **Shift+F8** - View payments received for each line item
- **Shift+F9** - Delete Transaction / Line
- **Alt+F4** - Refresh header information on a claim
- **Alt+F5** - View the response of an NCPDP claim
- **Alt+F7** - Print Patient Statement
- **Alt+F8** - Take an Adjustment
- **Alt+F9** - Create New Invoice with Custom Invoice #
- **Alt+E** - Enter New Expected Amount for Invoice

- **Ctrl+T** - Change Transaction Information
- **Ctrl+F9** - Credit / Rebill

Add/Edit a To Do Item

- **F4** - Select/Assign Patient to This To Do Item
- **F5** - Select/Assign a Person to Do This To Do Item
- **F6** - Add a Reply Line
- **F7** - Print the Specific To Do
- **F8** - Select/Assign Category to This To Do Item
- **F9** - View/Enter Notes for this To Do Item

Add Drug Order

- **F2** - Save the Drug Order
- **F4** - This is for Multi-Drug Orders
- **F12** - List History
- **Ctrl+F12** - View Faxes
- **Esc** - Cancel the Order

Add HME/Supply Order

- **F2** - Save the Order
- **F12** - View the prescription history for the patient.
- **Ctrl+F12** - View any assigned faxes to this patient.
- **Esc** - Cancel the Order

Add/Edit Catheter Entry

- **F2** - Save the catheter entry
- **F8** - Add a new progress note related to the catheter entry
- **Ctrl+F8** - View the list of progress notes related to this patient
- **Esc** - Close this screen

Add/Modify an Inventory Item

- **F1** - This Help Screen
- **F2** - Save / Exit
- **F3** - See Med-File information for this NDC
- **F4** - Edit Medicare / CMN Information
- **F5** - See Lots OR See Rental Items
- **F6** - View / Edit Special Prices

- **F8** - Enter Additional Inventory Fields (Tax, UB #42)
- **F9** - Delete Current Inventory Item
- **F10** - Popup
- **F11** - Clear the current field
- **Alt+F6** - View/Edit Other Special Prices
- **Shift+F5** - View TPN Information / Make This a TPN Ingredient
- **Ctrl+F5** - Remove TPN Information / Undo TPN

Add/Modify Drug with Lot Numbers

- **F1** - This Help Screen
- **F2** - Save/Exit
- **F4** - Change Cost/AWP
- **F10** - Add a New Lot
- **Alt+F1** - Make Last Prescription Filled ready to pull onto Delivery Ticket
- **Shift+F9** - Delete Item
- **Shift+F10** - Edit Lot

Add/Subtract From Inventory

- **F1** - This Help Screen
- **F2** - Save/Exit
- **F4** - Change Cost/AWP
- **F10** - Add a New Lot
- **Shift+F9** - Delete Item
- **Shift+F10** - Edit Lot

Adding a Visit Report

- **F2** - Save/Exit
- **F3** - View/Edit Medical History
- **F4** - Visit Note
- **F5** - Catheter Log
- **F6** - View/Edit Nursing Care Plan
- **F7** - Print Form
- **F9** - Add New Report
- **F10** - Popup Menu
- **F11** - Clear the current field
- **PgUp/PgDn** - Scroll Through Delivery Ticket Items
- **Ctrl+Enter** - Return to Main Menu

Adding an Assessment Report

- Print the Visit Report by clicking the **Print (F7)** button

- Save the report by clicking the **Save / Exit (F2 / Esc)** button.

Assigning Special Price Codes

- Press the **<F4>** key again when your Special Price Codes are appropriately matched with your EXISTING inventory categories. This function will automatically 'populate' your inventory file with Special Price codes based on your existing inventory categories.

Atlantic Associates Optional Module

- **F3** - key prior to creating the data file. This function key allows you to view and edit the data for the previous month or any entered date range.
- **F4** - key to create the data file. **CPR+** prompts you for a date range and to insert a blank disk. After pressing any key, the file is created and saved to the disk with the filename of NABP#.DAT. Mail this disk to Atlantic Associates who processes the data and contacts you with the results.
- **F5** - key to view the prescription dispensed log.

Batch Print Invoices

- **F1** - Help Window
- **F2** - Save / Exit
- **F7** - Print Invoices that are 'Tagged'
- **F8** - Batch Print Patient Statements (Prints Statements for all the Patients that currently have invoices with a balance due by the patient)
- **Spacebar** - Highlight the invoices to print, press the **SPACEBAR**, and the invoice is tagged to print
- **Shift+F5** - View Changes of Highlighted Invoice
- **Shift+F9** - Delete Invoice
- **Alt-F7** - Print a 'Batch' Invoice / Report

Billing/Collection Notes

- **F1** - This Help Screen
- **F2** - Save / Exit

- **F5** - Expand/Shrink Note
- **F7** - Print Selected Collection/Billing Notes
- **F8** - Tag all Collection Notes for printing
- **Alt + F9** - Edit Collection / Billing Note

Billing/Financial: Ready-to-Bill Delivery Tickets

- **F2** - Save / Exit
- **F3** - View Highlighted Delivery Ticket
- **F4** - View the Patient Menu
- **F5** - View Account Status Screen of the selected Delivery Ticket
- **F6** - Find Delivery Ticket by #
- **F7** - Print Delivery Tickets Ready To Bill
- **F9** - Create an Invoice from the highlighted Delivery Ticket
- **F10** - Change the Status of a selected Delivery Ticket
- **Alt+F8** - Select a Biller / Collector for a selected Delivery Ticket
- **Ctrl+F8** - Split a selected Delivery Ticket into two Tickets
- **Ctrl+Enter** - Return to Main Menu
- **Shift+F5** - Remove Delivery Ticket and assign it to Invoice #999999
- **Spacebar** - Unconfirm a selected Delivery Ticket

Care Plan Templates

- **F1** - Help
- **F2** - Save / Exit
- **F4** - Edit Template Name
- **F10** - Popup Windows
- **F11** - Clear the Current Field
- **Ctrl+Enter** - Return to Main Menu

(Multi-Disciplinary Care Plans)

- **F1** - Help
- **F2** - Save / Exit
- **F3** - Problems
- **F4** - Goals
- **F5** - Intervention
- **F7** - Print Care Plan
- **F9** - New Line
- **F10** - Physician Care Plan Problems
- **Ctrl+F10** - Nursing Care Plan Problems
- **Ctrl+Enter** - Return to Main Menu

Care Plan: Multi-Disciplinary

- **F2** - Save / Exit
- **F3** - View / Edit Medical History
- **F4** - Pop up Current Therapies
- **F7** - Print Pharmacy Care Plan
- **F6** - Marks a highlighted problem, goal or intervention as done (or resolved)
- **F9** - Create a New Line on the Problems, Goals and Intervention tabs to enter a problem, goal or intervention
- **F10** - Activate Popup Window
- **F11** - Clear the Current Field
- **Shift+F3** - View Medication Profile
- **Shift+F9** - Delete Record (second, third, and fourth tab screen)
- **Shift+F10** - Import NCP or PCP Template on the Problems, Goals and Interventions Tabs

Care Plan: Nursing

- **F2** - Save / Exit
- **F3** - View / Edit Medical History
- **F4** - Pop up Current Therapies
- **F7** - Print Pharmacy Care Plan
- **F6** - Marks a highlighted problem, goal or intervention as done (or resolved)
- **F9** - Create a New Line on the Problems, Goals and Intervention tabs to enter a problem, goal or intervention
- **F10** - Activate Popup Window
- **F11** - Clear the Current Field
- **Shift+F3** - View Medication Profile
- **Shift+F9** - Delete Record (second, third, and fourth tab screen)
- **Shift+F10** - Import NCP Template on the Problems, Goals and Interventions Tabs

Care Plan: Pharmacy

- **F2** - Save / Exit
- **F3** - View / Edit Medical History
- **F4** - Pop up Current Therapies
- **F7** - Print Pharmacy Care Plan
- **F6** - Marks a highlighted problem, goal or intervention as done (or resolved)
- **F9** - Create a New Line on the Problems, Goals and Intervention tabs to enter a problem, goal or intervention
- **F10** - Activate Popup Window
- **F11** - Clear the Current Field
- **Shift+F3** - View Medication Profile

- **Shift+F9** - Delete Record (second, third, and fourth tab screen)
- **Shift+F10** - Import PCP Template on the Problems, Goals and Interventions Tabs

- **F5** - View Demographics
- **F6** - Find Patient
- **F7** - Print List
- **F8** - Billing Notes
- **CTRL+F9** - Make Exception

Catheter Log

- **F2** - Close the Log screen
- **F3** - Edit an existing log entry
- **F7** - Print a list of the entries on the screen
- **F10** - Add a Catheter entry and enter the appropriate information

Check Closed Transactions

- **F3** - View the details of the invoice.
- **F5** - Revert the invoice back to its locked state. **WARNING:** Reverting the invoice will DELETE any transactions posted to it that are NOT in a closed period!
- **Shift+F7** - View a summary of an invoice in its current state.
- **Alt+F7** - View a summary of an invoice in its locked state.

Claims to Adjudicate - New Rx's

- **Book Icon** - Displays the Prescription History for the Primary Order.
- **Phone Icon** - Displays any faxes that are assigned to the patient or order.
- **F1** - This Help Screen
- **F2** - Save / Exit
- **F3** - View Response
- **F4** - View / Edit Claim
- **F5** - View Demographics
- **F6** - Find Patient
- **F7** - Print List
- **F8** - Billing Notes
- **CTRL+F9** - Make Exception

Claims to Adjudicate – Refills

- **Book Icon** - Displays the Prescription History for the Primary Order.
- **Phone Icon** - Displays any faxes that are assigned to the patient or order.
- **F1** - This Help Screen
- **F2** - Save / Exit
- **F3** - View Response
- **F4** - View / Edit Claim

Clean Room Ticket Items

- **F1** = Help
- **F2** = Save/Exit
- **F3/F4** = Date fields
- **F5** = Update Pricing
- **F6** = Deduct Items
- **F7** = Print
- **F8** = Select Rx Drug
- **F9** = Select Inventory Item
- **Shift+F10** = Supply Kit Templates

Closing Periods

- **F7** - Print a listing of the closed periods
- **F5** - Create a Star GL File (please contact D.H.S. to enable this enhancement)
- **Shift+F9** - Select a closing period and press this key combination to delete a closing period

CMN: Section A

- **F3** - View / Edit the Patient Info / Facility Info tab
- **F7** - Print Certificate of Medical Necessity
- **F10** - Popup
- **F11** - Clear the current field
- **Alt+N** - Enter Narrative (for Electronic Claim)
- **Shift+F4** - View Ordered Therapies

CMN: Section B

- **F2** - Save / Exit
- **F3** - View / Edit Medical History
- **F4** - Edit Facility Info / Formula Components
- **F7** - Print Certificate of Medical Necessity
- **F8** - Print the WCVO form (while on the Section B tab)
- **F10** - Popup
- **F11** - Clear the current field
- **Alt+N** - Enter Narrative (for Electronic Claim)
- **Shift+F4** - View Ordered Therapies

- **PgUp / PgDn** - Next/Previous Screen
- **Ctrl+Enter** - Return to Main Menu

Company Setup: Company Info Tab

- **F3** - Pharmacy Name - IF you are in Multi-Company Mode and need to have a Single Pharmacy Name to Appear on Labels.
- **F5** - Additional Information
- **F6** - Global Correspondence (for 10-month purchase letters)

Compounding Record Templates

- **F2** - Save/Exit
- **F4** - Edit Template Name
- **F7** - Print Template

Create Delivery Ticket: Delivery Ticket Items

- **F2** - Save
- **F3** - View / Edit Delivery Instructions
- **F4** - View / Edit Delivery Dates
- **F5** - Update Pricing from Inventory & Matrix
- **F6** - View HME / Supply Orders for the patient
- **F7** - Print the Delivery Ticket
- **F8** - Add Drug to Delivery Ticket
- **F9** - Add any Inventory Item to Delivery Ticket
- **Shift+F3** - View Notes for Primary Insurance Company
- **Shift+F9** - Delete the Highlighted Line / Item & Void a Fill if Necessary
- **Alt+B** - Make all 'B' = 'X' (Good for Itemized Billing)
- **Alt+P** - Make all 'P' = 'X' (Set All to Print on the Delivery Ticket)
- **Ctrl+B** - Make 'B' = 'X' (or set the field to blank if an X already exists)
- **Ctrl+P** - Make 'P' = 'X' (or set the field to blank if an X already exists)
- **Ctrl+D** - Edit Therapy Code and Therapy Days Information (Available on Compounded Drug Items Only)
- **Page Up / Page Down** - Scroll Through Delivery Ticket Items

Delivery Ticket - Driver Assignment

- **F2** - Save / Exit
- **F6** - Find Ticket
- **F7** - Print
- **F9** - Assign

Delivery Ticket Confirmation File

- **F2** - Save / Exit
- **F3** - View / Edit the Highlighted Delivery Ticket
- **F6** - Find Delivery Ticket by Delivery Ticket #
- **F7** - Print List of Delivery Tickets
- **F8** - Sort the Delivery Tickets by Patient's LAST NAME
- **Ctrl+F8** - Split Delivery Ticket into 2 Delivery Tickets
- **Shift+F9** - Delete the Highlighted Delivery Ticket
- **PgUp / PgDn** - Scroll Through Delivery Ticket
- **Ctrl+Enter** - Return to Main Menu

Delivery Ticket History

- **F2 (or Esc key)** - Close the Delivery History Screen
- **F3 / F6** - Displays a search screen in which to set parameters for a confirmed Delivery Ticket
- **F5** - Displays a search screen in which to enter date parameters to narrow the view of the tickets displayed on the grid
- **F7** - Prints a list of the confirmed Delivery Tickets that appear in the grid.

Delivery Ticket: Additional Functionality

- **F2** - Save/Exit
- **F3** - View/Edit Delivery Instructions
- **F4** - View/Edit Delivery Dates
- **F5** - Fill All Prices from Inventory & Matrix
- **F6** - View HME / Supply Orders
- **F7** - Print Delivery Ticket
- **F8** - Add Drug to Delivery Ticket
- **F9** - Add any Inventory Item to Delivery Ticket

- **Shift+F3** - View Notes for Primary Insurance Company
- **Shift+F9** - Delete the Highlighted Line / Item
- **Alt+B** - Make all 'B' = 'X' (Good for Itemized Billing)
- **Alt+P** - Make all 'P' = 'X' (Set All to Print on D.T.)
- **Ctrl+B** - Make 'B' = 'X' (or make it ' ' if already 'X')
- **Ctrl+P** - Make 'P' = 'X' (or make it ' ' if already 'X')
- **Ctrl+D** - Edit Therapy Code and Therapy Days Information (Available on Compounded Drug Items Only)
- **PgUp/PgDn** - Move through the different tabs on the Modify Delivery Ticket Screen
- **Ctrl+Enter** - Return to Main Menu

Demographic/Financial: Demographic Tab

- **F2** - Save/Exit
- **F3** - View/Edit Contacts
- **F5** - Access User-Defined Fields
- **F6** - View/Edit Nursing Care Plan
- **F7** - Print Admission Form
- **F8** - View Patient Status Log
- **F9** - Change Patient's Name
- **F10** - Activate Popup Window
- **F11** - Clear the current field
- **Shift+F5** - Enter a Mailing Address is different from the Delivery Address
- **Page Up/Page Down** - Next Tab
- **Alt+F3** - View Delivered Items (From Confirmed Tickets)
- **Alt+F7** - Print (Change "Date Printed" Default)
- **Alt+F11** - This will print a patient's chart label. This label includes the patient's name, street address, city, state, zip code, phone number, MRN, and referral date.
- **Ctrl+Enter** - Return to Main Menu

Demographic/Financial: M.D./Prov Tab

- **F2** - Save / Exit
- **F3** - View/Edit the patient's ancillary providers
- **F4** - Edit an Order
- **F7** - Print Admission Form/Demographic Information

- **F8** - Drug Allergies
- **F10** - Activate Popup Window
- **F11** - Clear the current field
- **PgUp / PgDn** - Next Screen
- **Alt+F7** - Print (Change 'Date Printed' Default)

Demographic/Financial: Med. Hx Tab

- **F2** - Save / Exit
- **F5** - Access Catheter Log
- **F7** - Print Admission Form / Demographic Information
- **F8** - Drug Allergies
- **F10** - Activate Popup Window
- **F11** - Clear the current field
- **PgUp/PgDn** - Next Screen
- **Alt+F7** - Print (Change "Date Printed" Default)

Demographic/Financial: Overview

- **F2** - Save / Exit
- **F3** - View / Edit Medical History
- **F5** - Access User Defined Fields
- **F7** - Print Admission Form or Print Rental Items List (while on the Rentals Tab)
- **F8** - View Patient Status Log
- **F9** - Change Client's Name (Demographics Tab)
- **F9** - Insurance Verification (Insurance Tab)
- **F10** - Activate Magnifying Glass / Popup Window
- **F11** - Clear the current field
- **PgUp / PgDn** - Next Screen
- **Alt+F7** - Print (Change 'Date Printed' Default)
- **Ctrl+Enter** - Return to Main Menu
- **Ctrl+F9** - Prints IV Pump Pickup Tag (If the *Pump* and *Serial #* fields are completed on the Med. Info tab)

Discharge Summary

- **F2** - Save / Exit
- **F3** - Medical History
- **F4** - View / Edit Clinical Summary
- **F7** - Print Discharge Summary

- **F8** - Print Discharge Summary w/ Cover Letter
- **F10** - Activate Popup Window
- **F11** - Clear the current field
- **Alt+F8** - See Progress Notes for this Patient
- **PgUp / PgDn** - Next / Previous Screen
- **Ctrl+Enter** - Return to Main Menu
- **F7** - Drug Information / Drug Education Monograph (available only with Facts and Comparisons).
- **Ctrl+F8** - This will allow you to add an Alternative Unit of Measure for your TPN Ingredient.
- **Shift+F5** - Select the TPN Info tab.

Document Management System

- **F2 / Esc** - Exit
- **F4** - Edit
- **F5** - View Document
- **F6** - Email Document
- **F8** - Return Document
- **F10** - Add
- **CTRL+F (F3)** - Search
- **Shift+F9** - Delete

Drug Item: Drug Lots Tab

- **F4** - Change Cost / AWP
- **F7** - Drug Information/Drug Education Monograph (available only with Facts and Comparisons)
- **F10** - Add a New Lot
- **Shift+F9** - Delete Item
- **Shift+F10** - Edit Lot
- **Ctrl+Enter** - Return to Main Menu

Drug Item: HCPC/Additional Info Tab

- **F3** - Display the Medi-Span Item Information screen.
- **F4** - Change Cost / AWP
- **F7** - Drug Information/Drug Education Monograph (available only with Facts and Comparisons)
- **F10** - Add a New Lot
- **Shift+F9** - Delete Item
- **Shift+F10** - Edit Lot
- **Ctrl+Enter** - Return to Main Menu

Drug Item: Item Info Tab

- **F3** - Display the Medi-Span Item Information screen.
- **F4** - Select the HCPC / Additional Info tab.
- **F5** - Select the Drug Lots tab.
- **F6** - Select the Special Pricing tab.

Drug Item: TPN Info Tab

- **F4** - Select the HCPC / Additional Info tab.
- **F5** - Select the Drug Lots tab.
- **F6** - Select the Special Pricing tab.
- **F7** - Drug Information / Drug Education Monograph (available only with Facts and Comparisons).
- **Ctrl+F8** - This will allow you to add an Alternative Unit of Measure for your TPN Ingredient.
- **Shift+F5** - Select the TPN Info tab.

Edit Pharmacy Claims

- **F1** - This Help Screen
- **F2** - Save / Exit
- **F3** - View Status / Results of Highlighted Claim
- **F4** - Make the Highlighted Claim Confirmed/Accepted
- **F5** - Send Claims that are 'Tagged' with R = 'X'
- **F6** - Enter WebMD Submitter Information / Setup
- **F7** - Send Claims that are 'Tagged' with R = 'X'
- **F8** - Check Eligibility of a Patient
- **F9** - Create a NEW WebMD/Medicaid Claim
- **Shift+F4** - Edit Highlighted Claim
- **Shift+F9** - Delete Claim
- **Ctrl+F8** - Send Reversal for Highlighted Claim

Edit Recurring Rental/DME Item

- **F6** - Change the Setup Status of this Item
- **F10** - Select the Item from Inventory
- **F11** - Clear the current field
- **Shift+F3** - Change the status of the highlighted rental or DME item

Electronic Claims Menu: DMERC Claims

- **F2** - Save / Exit
- **F4** - Make the highlighted claim confirmed / accepted.
- **F5** - Access the Electronic Transmission Menu.
- **F6** - Access the EDI Setup screen which is company specific.
- **F7** - Displays the Report Options screen to print All, Sent Claims, or Ready to Transmit Claims.
- **Shift+F4** - Edit a highlighted claim.
- **Shift+F5** - View the charges of highlighted invoices.
- **F9** - View the status of the claim.
- **Shift+F9** - Delete an invoice.
- **Ctrl+S** - This will assign the selected claim as sent by placing an "X" in the *S* Column.

Electronic Claims Menu: Pharmacy Claims

- **Alt+F6** - Make adjustments to the WebMD communication settings

Electronic Claims Submission: WebMD

- **F2** - Save / Exit
- **F4** - Make the highlighted claim confirmed / accepted.
- **F5** - Access the Electronic Transmission Menu.
- **F6** - Access the EDI Setup screen which is company specific.
- **F7** - Displays the Report Options screen to print All, Sent Claims, or Ready to Transmit Claims.
- **Shift+F4** - Edit a highlighted claim.
- **Shift+F5** - View the charges of highlighted invoices.
- **F9** - View the status of the claim.
- **Shift+F9** - Delete an invoice.
- **Ctrl+S** - This will assign the selected claim as sent by placing an "X" in the *S* Column.

Employee Setup: Options Tab

- **F2** - Save the Employee information

- **F7** - Print Barcode Label
- **Ctrl+P** - Processor Control # (see previous section)

Employee Setup: Privileges

- **F2** - Save/Exit
- **F4** - View the Attendance Records Tab
- **F6** - View the Pay Info Tab
- **F7** - Print a Bar Code Label
- **Spacebar** - Set / Unset Privileges (X = Has Access/Privilege)

Entering Invoice Charges

- **F3** - Insurance Notes
- **F4** - Copy "X'd" Items from Delivery Ticket to Charges
- **F5** - Assign Delivery Tickets to this Invoice
- **F6** - Switch to the Other Windows
- **F7** - N/A (Print Invoice After Hitting F2 to Save)
- **F8** - Bring in Previous Charges (Last Invoice)
- **F9** - Add a NEW Charge Line
- **F10** - Select Charge from Inventory File
- **Alt+F5** - View Insurance Verification items (if applicable)
- **Alt+F10** - Assign/Override Revenue Type for Charge Line Item
- **Alt+H** - Popup HCPC Code (Use Only if HCFA 1500 with HCPC)
- **Alt+M** - Popup Modifiers (USE Only if HCFA 1500 with HCPC)
- **Alt+N** - Enter Narrative Text (Use only if Electronic Medicare / EMC Invoice)
- **Alt+P** - Enter/Override the Place of Service (HCFA 1500 24b)
- **Alt+F6** - Popup CMN Section C Information
- **Alt+F9** - Enter NDC# on NEXT LINE of Highlighted Item (Text Description Mode Only - Not HCPC Mode)
- **Shift+F3** - View Information from Inventory File
- **Shift+F4** - View Ingredients from the Compound Record when your cursor is on the Rx.
- **Shift+F9** - This deletes a line item.
- **Shift+F10** - When on the charge lines of an invoice, this shortcut key displays the Special Price Matrix or Shared Contract Pricing for the Insurance Company assigned to the invoice.

- **Ctrl+S** - This will split a line into multiple lines.
- **Ctrl+F5** - See Sum/Total of Charge Amounts (Billed, Expected)
- **Ctrl+F8** - Use these keys to pull a TAR control number on to a 30-1 claim. Remember, the invoice type must be a 30-1 in order for this to work.

Enterprise HME: Authorization

- **F3** - View Orders
- **F4** - View the Patient Menu
- **F5** - View the Patient's Demographics
- **F6** - Find a Patient
- **F7** - Print a List of Patients
- **F8** - View the Billing Notes
- **Alt+F3** - View the Primary (and Secondary) Physician Information
- **Alt+F4** - View the Patient's Information

Enterprise HME: Billing Follow Up

- **F2** - Close the list
- **F3** - View Invoice / Account (displays the patient's Account Status Screen)
- **F4** - View the Patient Menu
- **F5** - View the Patient's Demographics
- **F6** - Find a Patient
- **F7** - Print a List of Patients
- **F8** - View the Billing Notes
- **F9** - View Orders
- **F11** - Follow Up Complete
- **Alt+F3** - View the Patient's Insurance
- **Enter** - Select a note

Enterprise HME: Clinical Follow Up

- **F2** - Close the List screen
- **F3** - View the Patient's Primary (and Secondary) Physician
- **F4** - View the Patient Menu
- **F5** - View the Patient's Demographics
- **F6** - Find a Patient
- **F7** - Print the list of patients
- **F8** - View the Care Plan
- **F9** - View Orders
- **F11** - Follow Up Complete
- **Alt+F3** - View the Patient's Insurance

- **Enter** - Select a Note

Enterprise HME: CMN/SMN Tracking

- **F3** - View the Patient's Primary (and Secondary) Physician
- **F4** - View the Patient Menu
- **F5** - View the Patient's Demographics
- **F6** - Find a Patient
- **F7** - Print a List of Patients
- **F8** - View the Billing Notes
- **F9** - View Orders
- **Alt+F3** - View the Patient's Insurance

Enterprise HME: Delivery Ticket Confirmation File

- **F2** - Save/Close
- **F3** - View Ticket
- **F4** - View Patient Menu
- **F5** - View Demographics
- **F6** - Find Ticket
- **F7** - Print the Unconfirmed Delivery Ticket Report
- **F8** - View Shipping
- **Alt+F5** - Confirm a batch of Delivery Tickets
- **Alt+F8** - Select a Biller / Collector
- **Ctrl+F8** - Split a selected ticket
- **Shift+F9** - Delete an unconfirmed Delivery Ticket
- **Enter** - Confirm a selected ticket

Enterprise HME: DMERC Electronic Claims

- **F1** - Help Screen
- **F2** - Close the List
- **F4** - Accept a Claim
- **F5** - View the Patient's Demographics
- **F6** - Find a Patient
- **F7** - Print a List
- **F8** - View Billing Notes
- **Alt+F3** - View Insurance
- **Shift+F4** - Edit a Claim
- **Ctrl+F9** - Edit the Insurance Company's EMC Setup

Enterprise HME: Incoming Faxes

- **F1** - Help Screen
- **F2/Esc** - Save / Close
- **F3** - Assign to Patient
- **F6** - New Patient
- **F7** - Print / Fax / Email
- **F8** - Move to Misc
- **F9** - New Drug Order
- **F10** - New Non-Drug Order
- **Ctrl+F3** - Assign to User

Enterprise HME: Order Entry/Completion

- **Arrow Icon** - Refreshes the grid with the latest Order Entries.
- **Book Icon** - Displays the Prescription History for the Primary Order.
- **Phone Icon** - Displays any faxes that are assigned to the patient or order.
- **F1** - This Help Screen
- **F2** - Save / Exit
- **F3** - View Physician
- **F4** - View Patient Menu
- **F5** - View Demographics
- **F6** - Find Patient
- **F7** - Print List
- **F8** - Progress Notes (Order Entry Screen)
- **F9** - View Rental Items
- **F10** - Add Non-Drug Order
- **Alt+F3** - View Insurance

Enterprise HME: Patient with Incomplete Info

- **Arrow Icon** - This will refresh the list that is on the screen.
- **Phone Icon** - Displays any faxes that are assigned to the patient or order.
- **F1** - Help Screen
- **F2** - Close the screen
- **F3** - View Physician
- **F4** - View Patient Menu
- **F5** - View Demographics
- **F6** - Find Patient
- **F7** - Print List
- **F8** - View Progress Notes
- **F9** - View Orders
- **Alt+F3** - View Insurance

Enterprise HME: Patients to Contact - New Orders

- **Arrow Icon** - This will refresh the list that is on the screen.
- **Phone Icon** - Displays any faxes that are assigned to the patient or order.
- **Book Icon** - Displays the Prescription History for the Primary Order.
- **Visa Icon** - Charge a patient's credit card with the new functionality added in version 7.1a.
- **F3** - View Physician
- **F4** - View Patient Menu
- **F5** - View Demographics
- **F6** - Find Patient
- **F7** - Print List
- **F8** - View Progress Notes
- **Alt+F3** - View Orders
- **Alt+F4** - View Rental Items
- **Alt+F9** - Setup Delivery Ticket

Enterprise HME: Patients to Contact-Recurring Supplies

- **Arrow Icon** - This will refresh the list that is on the screen.
- **Phone Icon** - Displays any faxes that are assigned to the patient or order.
- **Book Icon** - Displays the Prescription History for the Primary Order.
- **Visa Icon** - Charge a patient's credit card with the new functionality added in version 7.1a.
- **F3** - View Physician
- **F4** - View Patient Menu
- **F5** - View Demographics
- **F6** - Find Patient
- **F7** - Print List
- **F8** - View Progress Notes
- **Alt+F3** - View Orders
- **Alt+F4** - View Rental Items
- **Alt+F9** - Setup Delivery Ticket

Enterprise HME: Print Delivery Ticket

- **Arrow Icon** - This will refresh the list that is on the screen.
- **Phone Icon** - Displays any faxes that are assigned to the patient or order.

- **Book Icon** - Displays the Prescription History for the Primary Order.
- **F1** - Help Screen
- **F2** - Close the screen
- **F3** - View Physician
- **F4** - View Patient Menu
- **F5** - View Demographics
- **F6** - Find Patient
- **F7** - Print List
- **F8** - View Progress Notes
- **Alt+F3** - View Orders
- **Alt+F4** - View Rental Items

Enterprise HME: Ready-to-Bill Delivery Ticket

- **F2** - Save / Exit
- **F3** - View Highlighted Delivery Ticket
- **F4** - View the Patient Menu
- **F5** - View Account Status Screen of the selected Delivery Ticket
- **F6** - Find Delivery Ticket by #
- **F7** - Print Delivery Tickets Ready To Bill
- **F9** - Create an Invoice from the highlighted Delivery Ticket
- **F10** - Change the Status of a selected Delivery Ticket
- **Alt+F8** - Select a Biller / Collector for a selected Delivery Ticket
- **Ctrl+F8** - Split a selected Delivery Ticket into two Tickets
- **Shift+F5** - Remove Delivery Ticket and assign it to Invoice #999999
- **Shift+F8** - View the Status of a highlight Delivery Ticket
- **Spacebar** - Unconfirm a selected Delivery Ticket

Enterprise HME: Recurring Rentals

- **F1** - This Help Screen
- **F2** - Save / Close
- **F4** - Check Returns
- **F5** - Refresh Stats
- **F9** - Create Invoices
- **F10** - Create New Item
- **Shift+F5** - Mark As Sold
- **Enter** - Edit Item

Enterprise Rx: Authorizations

- **F3** - View Orders
- **F4** - View the Patient Menu
- **F5** - View the Patient's Demographics
- **F6** - Find a Patient
- **F7** - Print a List of Patients
- **F8** - View the Billing Notes
- **Alt+F3** - View the Primary (and Secondary) Physician Information
- **Alt+F4** - View the Patient's Information

Enterprise Rx: Billing Follow Up

- **F2** - Close the list
- **F3** - View Invoice / Account (displays the patient's Account Status Screen)
- **F4** - View the Patient Menu
- **F5** - View the Patient's Demographics
- **F6** - Find a Patient
- **F7** - Print a List of Patients
- **F8** - View the Billing Notes
- **F9** - View Orders
- **F11** - Follow Up Complete
- **Alt+F3** - View the Patient's Insurance
- **Enter** - Select a Note

Enterprise Rx: Claims to Adjudicate

- **F3** - View Responses
- **F5** - View Patient Menu
- **F6** - Find Patient
- **F7** - Print List
- **F8** - View Billing Notes
- **Alt+F3** - View Insurance
- **Alt+F4** - Retrieve an Invoice to Resubmit
- **Alt+F6** - Displays the Clearing House Setup screen
- **Shift+F4** - Edit Claim
- **Spacebar** - Change Status of a highlighted claims

Enterprise Rx: Clinical Follow Up

- **F1** - Help Screen
- **F2** - Save/Close
- **F3** - View Physicians
- **F4** - View Patient Menu
- **F5** - View Patient Menu
- **F6** - Find Patient

- **F7** - Print List
- **F8** - View Care Plan
- **F9** - View Orders
- **F11** - Follow Up Complete
- **Alt+F3** - View Insurance
- **Enter** - Select a Note

Enterprise Rx: Delivery Ticket Confirmation File

- **F2** - Save/Close
- **F3** - View Ticket
- **F4** - View Patient Menu
- **F5** - View Demographics
- **F6** - Find Ticket
- **F7** - Print the Unconfirmed Delivery Ticket Report
- **F8** - View Shipping
- **Alt+F5** - Confirm a batch of Delivery Tickets
- **Alt+F8** - Select a Biller / Collector
- **Ctrl+F8** - Split a selected ticket
- **Shift+F9** - Delete an unconfirmed Delivery Ticket
- **Enter** - Confirm a selected ticket

Enterprise Rx: Incoming Faxes

- **F1** - Help Screen
- **F2/Esc** - Save / Close
- **F3** - Assign to Patient
- **F6** - New Patient
- **F7** - Print / Fax / Email
- **F8** - Move to Misc
- **F9** - New Drug Order
- **F10** - New Non-Drug Order
- **Ctrl+F3** - Assign to User

Enterprise Rx: Order Entry/Completion

- **Arrow Icon** - Refreshes the grid with the latest Order Entries.
- **Book Icon** - Displays the Prescription History for the Primary Order.
- **Phone Icon** - Displays any faxes that are assigned to the patient or order.
- **F2** - Save / Exit
- **F3** - View Orders
- **F4** - View Patient Menu
- **F5** - View Demographics

- **F6** - Find Patient
- **F7** - Print an Order Entry Report
- **F8** - Progress Notes (Order Entry Screen)
- **F9** - Add a Drug Order
- **F10** - View Insurance

Enterprise Rx: Patients to Contact - New Rx's

- **Arrow Icon** - This refreshes the list with the latest information.
- **Book Icon** - Displays the Prescription History for the Primary Order.
- **Phone Icon** - Displays any faxes that are assigned to the patient or order.
- **F2** - Close
- **F3** - View Physician
- **F4** - View Patient Menu
- **F5** - View Demographics
- **F6** - Find Patient
- **F7** - Print the Patients to Contact Report
- **F8** - Progress Notes
- **Alt+F3** - View Orders
- **Alt+F4** - View Insurance

Enterprise Rx: Patients to Contact - Refill

- **Arrow Icon** - This refreshes the list with the latest information.
- **Book Icon** - Displays the Prescription History for the Primary Order.
- **Phone Icon** - Displays any faxes that are assigned to the patient or order.
- **F2** - Save / Exit
- **F3** - View Physician
- **F4** - View Patient Menu
- **F5** - View Demographics
- **F6** - Find Patient
- **F7** - Print the Patients to Contact - Refill Report
- **F8** - Progress Notes
- **Alt+F3** - View Orders
- **Alt+F4** - Change Dates (allows you to filter the list based on a specific date range)

Enterprise Rx: Patients with Incomplete Info

- **Arrow Icon** - This will refresh the list that is on the screen.

- **Phone Icon** - Displays any faxes that are assigned to the patient or order.
- **F1** - Help Screen
- **F2** - Close the screen
- **F3** - View Physician
- **F4** - View Patient Menu
- **F5** - View Demographics
- **F6** - Find Patient
- **F7** - Print List
- **F8** - View Progress Notes
- **F9** - View Orders
- **Alt+F3** - View Insurance

Enterprise Rx: Print Delivery Tickets

- **F1** - This Help Screen
- **F3** - View Physicians
- **F4** - View Patient Menu
- **F5** - View Demographics
- **F6** - Find Patient
- **F7** - Print List
- **F8** - View Progress Notes
- **Alt+F3** - View Orders
- **Alt+F4** - View Insurance
- **Alt+F5** - Batch Print and Confirm Delivery Tickets
- **Enter** - View and Print a Highlight Delivery Ticket
- **Space** - Tag a highlighted Delivery Ticket for Batch Processing

Enterprise Rx: Process Rx/Print Labels

- **F1** - This Help Screen
- **F3** - View Physicians
- **F4** - View Patient Menu
- **F5** - View Demographics
- **F7** - Print List
- **F8** - View Progress Notes
- **F9** - View Orders
- **Alt+F3** - View Allergies
- **Alt+F5** - Batch Print Rx's
- **Enter** - View and Print a Highlight Delivery Ticket
- **Space** - Tag a highlighted Rx for Batch Processing

Enterprise Rx: Ready-to-Bill Delivery Tickets

- **F2** - Close
- **F3** - View Highlighted Delivery Ticket
- **F4** - View the Patient Menu
- **F5** - View Account Status Screen of the selected Delivery Ticket
- **F6** - Find Delivery Ticket by #
- **F7** - Print Delivery Tickets Ready To Bill
- **F9** - Create an Invoice from the highlighted Delivery Ticket
- **F10** - Change the Status of a selected Delivery Ticket
- **Alt+F8** - Select a Biller / Collector for a selected Delivery Ticket
- **Ctrl+F8** - Split a selected Delivery Ticket into two Tickets
- **Shift+F5** - Remove Delivery Ticket and assign it to Invoice #999999
- **Shift+F8** - View the Status of a highlight Delivery Ticket
- **Spacebar** - Unconfirm a selected Delivery Ticket

Enterprise Rx: Select Lots/Fill Rx

- **Arrows Icon** - This refreshes the list on the screen.
- **Book Icon** - Displays the Prescription History for the Primary Order.
- **Phone Icon** - Displays any faxes that are assigned to the patient or order.
- **F1** - This Help Screen
- **F2** - Save / Exit
- **F3** - View Physician
- **F4** - View Patient Menu
- **F5** - View Demographics
- **F6** - Find Patient
- **F7** - Print List
- **F8** - Progress Notes
- **F9** - View Orders
- **Alt+F3** - View Allergies

Enterprise Rx: Test Claim

- **F1** - This Help Screen
- **F3** - View Responses
- **F6** - View Patient Menu
- **F5** - Clear Claim
- **F7** - Print List
- **F8** - View Billing Notes

- **F9** - Find Patient
- **Alt+F3** - View Insurance
- **Shift+F4** - View and/or Edit a Claim

Enterprise Rx: Zero Doses Remaining

- **Arrows Icon** - This refreshes the list on the screen.
- **Book Icon** - Displays the Prescription History for the Primary Order.
- **Phone Icon** - Displays any faxes that are assigned to the patient or order.
- **F1** - This Help Screen
- **F2** - Save / Exit
- **F3** - View Physician
- **F4** - View Patient Menu
- **F5** - View Demographics
- **F6** - Find Patient
- **F7** - Print List
- **F8** - Extend Rx
- **F9** - DC Prescription
- **Alt+F9** - Discharge Patient

Free-Form Orders

- **F1** - Help Window
- **F2** - Save / Exit
- **F7** - Print Free Form Orders
- **Ctrl+Enter** - Return to the Main Menu

HCFA 1500 Claim

- **F2** - Save / Exit
- **F4** - View / Edit Charges
- **F7** - Print HCFA 1500 (**Shift+F7** - Adjust Margins)
- **F9** - Delete the Information for this HCFA Form
- **F10** - Popup
- **F11** - Clear the current field
- **Page Up/Page Down** - Go to HCFA 1500 Tabs
- **Shift+F7** - Change Print Margins
- **Ctrl+F4** - View / Edit Electronic Claims Info (EMC Only)

HCFA 1500 Insured Information

- **F1** - This Help Screen
- **F2** - Close Window

- **F11** - Clear the current field
- **Ctrl+Enter** - Return to Main Menu

Home Health Certification (485)

- **F1** - Help Window
- **F2** - Save / Exit
- **F7** - Print 485 POT
- **F8** - Print 487 Addendum to POT
- **F10** - Activate popup window
- **F11** - Clear out a field
- **Shift+F10** - Import POT Template (page / tab two only)

Home Health Certification (485) Template

- **F1** - This Help Screen
- **F2** - Save/Exit
- **F10** - Orders popup database

Insurance Company: 1500 Options Tab

- **F3** - Notes
- **F5** - Other Info Tab
- **F6** - View/Create Special Price Matrix
- **F7** - Print Shipping Label
- **F8** - Edit WebMD (Electronic Claims) Setup
- **F9** - Delete Insurance Company
- **F10** - Popup
- **F11** - Clear the Current Field

Insurance Company: Alt. Billing Addresses Tab

- **F3** - Notes Tab
- **F4** - HCFA 1500 Options Tab
- **F5** - Other Info Tab
- **F6** - View/Create Special Price Matrix
- **F7** - Print Shipping Label
- **F8** - Edit WebMD (Electronic Claims) Setup
- **F9** - Delete Insurance Company
- **F10** - Popup
- **F11** - Clear the Current Field

Insurance Company: CMS 1500 Options Tab

- **F3** - Notes
- **F5** - Other Info Tab
- **F6** - View/Create Special Price Matrix
- **F7** - Print Shipping Label
- **F8** - Edit WebMD (Electronic Claims) Setup
- **F9** - Delete Insurance Company
- **F10** - Popup
- **F11** - Clear the Current Field

Insurance Company: General/Billing Info Tab

- **F3** - Notes
- **F4** - HCFA 1500 Options
- **F5** - Other Info Tab
- **F6** - View/Create Special Price Matrix
- **F7** - Print Shipping Label
- **F8** - Edit WebMD (Electronic Claims) Setup
- **F9** - Delete Insurance Company
- **F10** - Popup
- **F11** - Clear the Current Field
- **Ctrl+F9** - Unassign a Shared Contract

Insurance Company: Notes (F3) Tab

- **F2** - Save/Exit
- **F3** - Notes
- **F4** - HCFA 1500 Options
- **F5** - Other Info Tab
- **F6** - View/Create Special Price Matrix
- **F7** - Print Shipping Label
- **F8** - Edit WebMD (Electronic Claims) Setup
- **F9** - Delete Insurance Company
- **F10** - Popup
- **F11** - Clear the Current Field

Insurance Company: Setup Options Tab

- **F3** - Notes
- **F4** - HCFA 1500 Options
- **F5** - Other Info Tab
- **F6** - View/Create Special Price Matrix
- **F7** - Print Shipping Label
- **F8** - Edit WebMD (Electronic Claims) Setup
- **F9** - Delete Insurance Company

- **F10** - Popup
- **F11** - Clear the Current Field

Lab Orders: Lab Results Screen

- **F2** - Close the screen
- **F3** - Edit an existing Lab Test result
- **F6** - Add a Lab Result based on a selected Lab Profile or Test
- **F7** - Print the Lab Results for the patient
- **F9** - Add a result from a Lab Test popup
- **Shift+F10** - Add results from a Lab Profile Template

Main Menu: Daily Dose

- **F2 / Esc** - Close
- **F3** - Charts
- **F6** - Training Schedule

Medication Profile

- **F2** - Save / Exit
- **F3** - Popup Medi-Span Options (Module purchased separately)
- **F4** - Edit an existing medication
- **F7** - Print only the active medication for the patient
- **F9** - Add a new medication for this patient
- **Shift+F9** - Delete an existing medication
- **Ctrl-F7** - Print all of the medication for the patient

Medi-Span Item Information

- **F5** - View the price history of this drug item.
- **F2** - Add this item to your inventory.

Multi-Drug Orders

- **F2** - Save the Drug Order
- **F4** - Edit a Drug
- **F10** - Add a Drug
- **Shift+F9** - Delete a Drug

New Patient Referral

- **F2** - Save/Exit
- **F7** - Print Admission Form

- **F10** - Activate Popup Window
- **F11** - Clear the current field
- **Page Up/Page Down** - Next Tab

Nursing Visit Log

- **F2** - Save changes
- **F3** - Edit a selected Nursing Log entry
- **F4** - Make a selected Nursing Log entry Ready-to-Bill
- **F6** - See all Nursing Log entries
- **F7** - Print Nursing Log entries
- **F8** - Unassign a previously billed visit
- **F10** - Add a new Nursing Visit entry
- **Shift+F9** - Delete a selected Nursing Log entry
- **Alt+F6** - Search for a patient by his or her last name

Patient Delivery Ticket List

- **F2/Esc** - Save and Exit
- **F3** - View Tickets
- **Spacebar** - Un-assign DT (Account Status Screen Only!)

Patient Invoice

- **F2/Esc** - Saves the patient invoice and closes the screen.
- **Shift+F3** - This allows for the addition of tax to a generic invoice.

Pharmacy P.O. Work Order

- **F3** - Print a Patient Drug Education Report for the drug you are filling
- **F4** - Fill or refill the prescription
- **F7** - Print the Work Order
- **F8** - Select Drug from Inventory
- **F10** - Popup Database Menu
- **Shift+F1** - Calendar
- **Shift+F3** - Prescription Setup Information
- **Shift+F4** - Edit Drug Order
- **Shift+F7** - Reprint Labels
- **Alt+F1** - Make the Prescription ready to pull onto a Delivery Ticket

Physician Orders / Plan of Treatment

- **F2** - Save / Exit
- **F4** - Edit Template Name (Standard Plan of Treatment)
- **F10** - Create a New Template / Popup Windows
- **Shift+F4** - Edit Template Name
- **Shift+F9** - Delete Name and Associated Template

PO Prescription/PO Label Template

- **F4** - Edit the template name
- **F11** - Clear the current field

Popup Windows

- **F2** - Save the changes to the Popup.
- **F3** - Edit the selected Popup (not available on all popup screens.)
- **F9** - Delete the selected popup (not available on all popup screens.)
- **F10** - Add a new entry (or popup). This may not be available on all popup screens.
- **Esc** - Close the screen.

Prescription File/Labels

- **F3** - View the Prescription Form
- **F4** - Change the Next Compounding Date of a selected prescription.
- **F5** - Discontinue an Rx
- **F6** - See all Rx's (Active and DC'd)
- **F9** - Create a New Rx
- **Shift+F9** - Delete an Rx
- **Enter** - Select an Rx

Progress Notes

- **F2** - Exit (Save Note on the New Note tab)
- **F4** - Select the New Note tab
- **F5** - View Details (Clear Fields on the New Note tab)
- **F6** - Select the Note History tab
- **F7** - Print Selected Progress Notes
- **F8 (Space)** - Tag all Progress Notes for printing

- **F9** - Select the Care Plan Interventions
- **Alt + F9** - Edit Progress Note
- **Alt+S** - Spell check a note on the New Note tab

Purchase Order Entry

- **F4** - View the Detail of the highlighted Inventory Item
- **F6** - Search for a particular Inventory Item
- **F7** - Print or Preview the Purchase Order

PWO: Compounding Record

- **F2** - Save Compound Record & Save/Exit
- **F3** - Create Prescription Form
- **F4** - View/Edit Compounding Record
- **F6** - View/Edit Compounding Instructions
- **F7** - Print Pharmacy Work Order/Compounding Record
- **F8** - Edit/Print Labels
- **F10** - Activate Popup Window
- **F11** - Clear the current field

Recurring Rentals / DME File

- **F3** - View Billing Notes
- **F4** - Edit Charges (Use if Multiple Line Items Req'd)
- **F5** - View / Edit CMN / SMN
- **F8** - Refresh Stats
- **F9** - Create Bills (Hard Copy / Electronic)
- **F10** - Add a New Rental/DME Recurring Item
- **Shift+F3** - Change the status of the highlighted rental or DME item
- **Shift+F4** - View/Edit Invoice Information
- **Shift+F5** - Make the Highlighted Item Sold
- **Alt+T** - Print a 10 Month Letter
- **Page Up / Page Down** - Scroll Up/Down List
- **Ctrl+F** - Search by Patient's Last Name.
- **<Enter>** - Edit Highlighted Item

Rental Item: Adding or Editing

- **F7** - Print the item's barcode.
- **F10** - Assign to item to a patient.
- **Shift + F10** - Log that the Preventative Maintenance is done for this item.

Rental Item: Item Info Tab

- **F3** - See Med-File Information for this NDC#
- **F4** - Edit Medicare/CMN information
- **F5** - See Lots OR See Rental Items
- **F6** - View/Edit Special Prices
- **F8** - Enter Additional Inventory Fields (Tax, UB92 Rev-Code)
- **F9** - Delete Current Inventory Rental Item (If this is serialized rental item with an attached rental history, you can not delete this item.)
- **F10** - Popup / Magnifying Glass
- **F11** - Clear the current field
- **Shift+F5** - View TPN Information / Make This a TPN Ingredient (for drug items only)
- **Ctrl+F5** - Remove TPN information / Undo TPN (for drug items only)

Shared Contracts

- **F3** - Fill the Special Prices
- **F4** - Fill the Expected Amounts
- **F5** - Pick from Contracts
- **F6** - Search for an Inventory Item by Name
- **F7** - Print Contract List
- **F9** - Delete the Entire Matrix
- **F10** - Add a New Contract
- **Alt+F3** - Clear Out Special Prices
- **Alt+F4** - Clear Out Expected Prices

SMN: Description of Product / Service

- **F3** - View / Edit Medical History
- **F7** - Print Statement of Medical Necessity
- **F8** - Print this document with a Cover Letter
- **F10** - Activate Popup Window
- **F11** - Clear the current field

SMN: Order Info / Dates

- **F3** - View / Edit Medical History
- **F7** - Print Statement of Medical Necessity
- **F8** - Print this document with a Cover Letter
- **F10** - Activate Popup Window
- **F11** - Clear the current field

SMN: Therapies/Medical Necessity

- **F3** - View / Edit Medical History
- **F7** - Print Statement of Medical Necessity
- **F8** - Print this document with a Cover Letter
- **F10** - Activate Popup Window
- **F11** - Clear the current field

Special Price Matrix

- **F3** - Fill the Special Prices
- **F4** - Fill the Expected Amounts
- **Shift+F4** - Edit highlight item
- **F5** - Fill Special Codes
- **F6** - Search for an Inventory Item by Name.
- **F7** - Print Matrix
- **F9** - Delete the Entire Matrix.
- **Alt+F3** - Clear out the Special Prices
- **Alt+F4** - Clear out the Expected Prices

Standard Plan of Treatment Overview

- **F2** - Save / Exit
- **F3** - View / Edit Medical History
- **F6** - View / Edit Nursing Care Plan
- **F7** - Print POT
- **F8** - Print POT w/ Cover Letter
- **F10** - Activate popup window
- **F11** - Delete current field
- **Shift+F1** - View Calendar
- **Shift+F8** - Print Cover Letter only
- **Shift+10** - Import POT Template (Problem / Goals, Orders or Medical History Tab)
- **Alt+F8** - View Progress Notes for this patient

Supply Item: HCPC / Additional Info Tab

- **F4** - Select the HCPC / Additional Info tab.
- **F5** - Select the Rental Items tab.
- **F6** - Select the Special Pricing tab.
- **F7** - Print rental item information.

Supply Item: Item Info Tab

- **F4** - Select the HCPC / Additional Info tab.

- **F5** - Select the Rental Items tab.
- **F6** - Select the Special Pricing tab.
- **F7** - Print rental item information.

Supply Item: Qty / Costs Tab

- **F4** - Select the HCPC / Additional Info tab.
- **F5** - Select the Rental Items tab.
- **F6** - Select the Special Pricing tab.
- **F7** - Print rental item information.

Supply Item: Special Prices Tab

- **F4** - Select the HCPC / Additional Info tab.
- **F5** - Select the Rental Items tab.
- **F6** - Select the Special Pricing tab.
- **F7** - Print rental item information.
- **F10** - Edit a special price related to an insurance company.

Supply Items: Notes Tab

- **F4** - Select the HCPC / Additional Info tab.
- **F5** - Select the Rental Items tab.
- **F6** - Select the Special Pricing tab.
- **F7** - Print rental item information.

Supply Items: Site Info Tab

- **F3** - Edit site specific information.
- **F4** - Select the HCPC / Additional Info tab.
- **F5** - Select the Rental Items tab.
- **F6** - Select the Special Pricing tab.
- **F7** - Print rental item information.
- **Space** - Assign a site.
- **Alt+F3** - Edit all information for all sites.

Supply Kit Templates

- **F2** - Save/Exit
- **F4** - Edit Template Name
- **F7** - Print Template

System Setup: ORYX Setup

- **F4** - View / Edit the Modem Script

Things To Do List

- **F3** - Edit To Do Item
- **F4** - Select/Assign Patient to This To Do Item
- **F5** - Select/Assign a Person to Do This To Do Item
- **F6** - Done! Record this To Do Item Done (Priority -1)
- **F7** - Print Report of To Do Items
- **F8** - Select/Assign Category to This To Do Item
- **F9** - View/Enter Notes for this To Do Item
- **F10** - Add a New To Do Item
- **Shift+F1** - View Calendar
- **Shift+F6** - See Just Your To Do Items
- **Shift+F8** - Displays a list of Categories/Departments that can be assigned a To Do
- **Shift+F9** - Delete the Highlighted To Do Item
- **Alt+A** - Displays a list of **CPR+** Users (Names) that can be assigned a To Do
- **Alt+F8** - See All To Do Items
- **Ctrl+Enter** - Return to Main Menu

TPN Order Entry

- **F2** - Save/Exit (Template) Continue (Prescription)
- **F3** - Edit TPN Ingredient (Amount/Units/Qual/Scale)
- **F8** - Calculate (Template) Confirm (Prescription)
- **F9** - Create a New Line for a TPN Ingredient
- **F10** - Popup / Select Ingredient for TPN Order

Unapplied Cash

- **F3** - Edit
- **F7** - Print
- **F10** - Add New
- **Shift+F9** - Delete

Verbal Orders

- **F2** - Save / Exit
- **F7** - Print Verbal Orders
- **F8** - Print Verbal Orders w / Cover Letter
- **Shift+10** - Select From the POT Templates

View Outcomes Log

- **F3** - View Notes/Additional Information about the highlighted occurrence
- **F7** - Print the Log
- **Shift+F9** - Delete the Highlighted Outcome and a password is required

View/Edit Lot #'s of Drugs Dispensed

- **F2** - Save / Exit
- **F7** - Print the Lot #'s
- **Shift+F9** - Delete a highlighted line
- **Tab** - Move the cursor to the right
- **Up/Down** (Arrow Keys) - Scroll through the Lot # log

View/Edit Prescriptions Dispensed

- **F2** - Save / Exit
- **F7** - Print the Lot #'s
- **Shift+F9** - Delete a highlighted line
- **Tab** - Move the cursor to the right
- **Up/Down** (Arrow Keys) - Scroll through the Lot # log

Visit Report/Assessment

- **F9** - Add a New Report
- **Shift+F9** - Delete a Report
- **Enter** - Edit Report

WebMD Medical Claims Setup

- **F8** - Select an Electronic Setup Template
- **F9** - Access the Advanced 837 Claim Setup Options screen (for ACM electronic claims)

Table of Contents

Introduction	1
835 ERN Report Screen	2
A/R Manager	2
Account Status Screen.....	2
Add/Edit a To Do Item	2
Add Drug Order	2
Add HME/Supply Order.....	2
Add/Edit Catheter Entry.....	2
Add/Modify an Inventory Item	2
Add/Modify Drug with Lot Numbers	3
Add/Subtract From Inventory.....	3
Adding a Visit Report.....	3
Adding an Assessment Report.....	3
Assigning Special Price Codes	3
Atlantic Associates Optional Module.....	3
Batch Print Invoices	3
Billing/Collection Notes	3
Billing/Financial: Ready-to-Bill Delivery Tickets	4
Care Plan Templates	4
(Multi-Disciplinary Care Plans).....	4
Care Plan: Multi-Disciplinary.....	4
Care Plan: Nursing	4
Care Plan: Pharmacy.....	4
Catheter Log	5
Check Closed Transactions.....	5
Claims to Adjudicate - New Rx's	5
Claims to Adjudicate – Refills	5
Clean Room Ticket Items.....	5
Closing Periods	5
CMN: Section A.....	5
CMN: Section B.....	5
Company Setup: Company Info Tab	6
Compounding Record Templates.....	6
Create Delivery Ticket: Delivery Ticket Items.....	6
Delivery Ticket - Driver Assignment	6
Delivery Ticket Confirmation File	6
Delivery Ticket History.....	6
Delivery Ticket: Additional Functionality	6
Demographic/Financial: Demographic Tab	7
Demographic/Financial: M.D./Prov Tab	7
Demographic/Financial: Med. Hx Tab.....	7
Demographic/Financial: Overview.....	7
Discharge Summary	7
Document Management System.....	8
Drug Item: Drug Lots Tab	8
Drug Item: HCPC/Additional Info Tab	8
Drug Item: Item Info Tab.....	8
Drug Item: TPN Info Tab.....	8
Edit Pharmacy Claims.....	8
Edit Recurring Rental/DME Item.....	8
Electronic Claims Menu: DMERC Claims	9
Electronic Claims Menu: Pharmacy Claims	9
Electronic Claims Submission: WebMD	9

Table of Contents

Employee Setup: Options Tab	9
Employee Setup: Privileges	9
Entering Invoice Charges	9
Enterprise HME: Authorization	10
Enterprise HME: Billing Follow Up	10
Enterprise HME: Clinical Follow Up	10
Enterprise HME: CMN/SMN Tracking	10
Enterprise HME: Delivery Ticket Confirmation File	10
Enterprise HME: DMERC Electronic Claims	10
Enterprise HME: Incoming Faxes	11
Enterprise HME: Order Entry/Completion	11
Enterprise HME: Patient with Incomplete Info	11
Enterprise HME: Patients to Contact - New Orders	11
Enterprise HME: Patients to Contact-Recurring Supplies	11
Enterprise HME: Print Delivery Ticket	11
Enterprise HME: Ready-to-Bill Delivery Ticket	12
Enterprise HME: Recurring Rentals	12
Enterprise Rx: Authorizations	12
Enterprise Rx: Billing Follow Up	12
Enterprise Rx: Claims to Adjudicate	12
Enterprise Rx: Clinical Follow Up	12
Enterprise Rx: Delivery Ticket Confirmation File	13
Enterprise Rx: Incoming Faxes	13
Enterprise Rx: Order Entry/Completion	13
Enterprise Rx: Patients to Contact - New Rx's	13
Enterprise Rx: Patients to Contact - Refill	13
Enterprise Rx: Patients with Incomplete Info	13
Enterprise Rx: Print Delivery Tickets	14
Enterprise Rx: Process Rx/Print Labels	14
Enterprise Rx: Ready-to-Bill Delivery Tickets	14
Enterprise Rx: Select Lots/Fill Rx	14
Enterprise Rx: Test Claim	14
Enterprise Rx: Zero Doses Remaining	15
Free-Form Orders	15
HCFA 1500 Claim	15
HCFA 1500 Insured Information	15
Home Health Certification (485)	15
Home Health Certification (485) Template	15
Insurance Company: 1500 Options Tab	15
Insurance Company: Alt. Billing Addresses Tab	15
Insurance Company: CMS 1500 Options Tab	16
Insurance Company: General/Billing Info Tab	16
Insurance Company: Notes (F3) Tab	16
Insurance Company: Setup Options Tab	16
Lab Orders: Lab Results Screen	16
Main Menu: Daily Dose	16
Medication Profile	16
Medi-Span Item Information	16
Multi-Drug Orders	16
New Patient Referral	16
Nursing Visit Log	17
Patient Delivery Ticket List	17
Patient Invoice	17
Pharmacy P.O. Work Order	17
Physician Orders / Plan of Treatment	17
PO Prescription/PO Label Template	17

Table of Contents

Popup Windows	17
Prescription File/Labels	17
Progress Notes	17
Purchase Order Entry	18
PWO: Compounding Record	18
Recurring Rentals / DME File	18
Rental Item: Adding or Editing	18
Rental Item: Item Info Tab	18
Shared Contracts	18
SMN: Description of Product / Service	18
SMN: Order Info / Dates	18
SMN: Therapies/Medical Necessity	19
Special Price Matrix	19
Standard Plan of Treatment Overview	19
Supply Item: HCPC / Additional Info Tab	19
Supply Item: Item Info Tab	19
Supply Item: Qty / Costs Tab	19
Supply Item: Special Prices Tab	19
Supply Items: Notes Tab	19
Supply Items: Site Info Tab	19
Supply Kit Templates	19
System Setup: ORYX Setup	19
Things To Do List	20
TPN Order Entry	20
Unapplied Cash	20
Verbal Orders	20
View Outcomes Log	20
View/Edit Lot #'s of Drugs Dispensed	20
View/Edit Prescriptions Dispensed	20
Visit Report/Assessment	20
WebMD Medical Claims Setup	20